

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 24 - Elder Law and Advocacy

From: 07/01/2010 To: 06/30/2011

## Public and Media Data Report

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Type of Activity</b>					
<b>Interactive Presentations to Public in Person</b>					
Total Number of Events	1	0	0	3	4
Estimated Number of Attendees	10	0	0	105	115
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Booths or Exhibits at Fairs or Special Events</b>					
Total Number of Events	0	2	1	1	4
Estimated Number of Attendees	0	187	150	70	407
Estimated Number of Persons Provided Enrollment Assistance	0	180	150	0	330
<b>Mobile InfoVan Events</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Provided Enrollment Assistance	0	0	0	0	0
<b>Dedicated Enrollment Events</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
Estimated Number of Persons Received Any Enrollment Assistance	0	0	0	0	0
Enrollment Assistance with Medicare Programs(s)	0	0	0	0	0
Enrollment Assistance with Part D	0	0	0	0	0
Enrollment Assistance with LIS	0	0	0	0	0
Enrollment Assistance MSP	0	0	0	0	0
Enrollment Assistance with Other Medicare Program	0	0	0	0	0
<b>Radio Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	0	0	0	0	0
Estimated Number of Attendees	0	0	0	0	0
<b>TV/Cable Shows Live or Taped (Not a Public Service Announcement)</b>					
Total Number of Events	1	0	0	0	1
Estimated Number of Attendees	50,000	0	0	0	50,000
<b>Other Electronic Events (Public Service Announcements (Radio/TV), Ads, Crawls, etc.)</b>					
Total Number of Activities	0	0	0	0	0
Estimated Number of Persons Reached	0	0	0	0	0

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<b>Other Print Activity (newspaper articles, fliers, phamplets, etc.)</b>					
Total Number of Print Activities	0	0	0	0	0
Estimated Number of Targeted Persons Reached	0	0	0	0	0
<b>Presenters</b>					
<b>HICAP Paid Staff</b>					
Total Presenters	2	2	0	4	8
Total Hours for Length of Activities	6.30	3.00	0.00	11.30	20.60
<b>HICAP In-Kind Paid Staff</b>					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
<b>HICAP Volunteer Staff</b>					
Total Presenters	0	0	0	0	0
Total Hours for Length of Activities	0.00	0.00	0.00	0.00	0.00
<b>Other Presenters</b>					
Total Presenters	0	0	1	0	1
Total Hours for Length of Activities	0.00	0.00	4.30	0.00	4.30
<b>Area of Focus</b>					
Dual Eligible with Mental Illness	3	2	1	4	4
Employer Termination - COBRA	0	0	0	3	3
General HICAP Information	2	2	1	4	9
Grievances / Appeals - Plan Issues	1	1	1	4	7
Long-Term Care / Insurance	1	0	1	4	6
Low Income Subsidy (LIS) / Application Assistance	2	2	1	4	9
Medicare (Parts A & B)	2	2	1	4	9
Medicare Advantage (Part C)	2	2	1	4	9
Medicare Fraud / Abuse	2	2	1	4	9
Medicare Prescription Drug Coverage (Part D)	2	2	1	4	9
Medigap / Medicare Supplements	1	1	1	4	7
Non-Medicare Fraud/Abuse	1	0	0	0	1
Other Topics / Issues (Health Specific)	0	0	0	0	0

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	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Partnership Recruitment	0	0	0	0	0
Preventive Care Benefits	1	1	1	4	7
QMB/SLMB/QI	1	2	1	4	8
Volunteer Recruitment	0	0	0	1	1
<b>Targeted Audience</b>					
African American	2	2	1	4	9
American Indian or Naitave Alaskan	2	2	1	4	9
Asian Indian	0	0	1	3	4
Caucasian	2	2	1	4	9
Chinese	0	0	1	4	5
Disabled	2	2	1	4	9
Dual Eligible Groups	0	0	0	3	3
Employer Related Groups	2	2	1	4	9
Family Member/Caregiver of Beneficiary	2	2	1	4	9
Filipino	0	0	1	3	4
Guamanian or Chamorro	0	0	1	3	4
Hispanic / Latino	2	2	1	4	9
Hmong	0	0	0	0	0
Japanese	0	0	1	3	4
Korean	0	0	0	2	2
Low Income	2	2	1	3	8
Medicare Beneficiaries	2	2	1	4	9
Medicare Pre-Enrollees	0	0	0	4	4
Mental Health	2	1	1	0	4
Mental Health Professionals	0	0	1	2	3
Native Hawaiian	0	0	0	3	3
Other	0	0	0	0	0
Other Asian	2	2	1	0	5
Other Pacific Islander	2	2	1	0	5
Partnership Outreach	0	0	1	1	2
Presentations to Groups in Language Other than English	2	2	1	0	5
Rural	1	2	1	0	4
Samoan	0	0	1	2	3
Socail Work Professionals	0	0	1	1	2
Some Other Race or Ethnicity	0	0	0	0	0
Vietnamese	0	0	1	3	4

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#### Public and Media Data Report

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Web Site Hits</b>					
Total Web Hits to Local HICAP Web Site	0	0	0	0	0
<b>Literature from Events</b>					
General HICAP Brochure	100	178	150	375	803
"Taking Care of Tomorrow"	0	0	0	0	0
Other Publications (Created by or on Behalf of Local HICAP)	200	700	150	450	1,500
<b>Other Literature</b>					
Other Literature	0	0	0	0	0
Brochures from Quick Call	0	1	0	0	1

## Health Insurance Counseling and Advocacy (HICAP) Aggregate Report

## Program: PSA 24 - Elder Law and Advocacy

From: 07/01/2010 To: 06/30/2011

## Client Contacts &amp; Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>SECTION 1 - Client Contacts</b>					
Total Clients Counseled (unduplicated)	38	42	19	14	113
Total Finalized Intakes	30	33	14	11	88
<b>How did client learn about SHIP/HICAP?</b>					
Agency (Social Security, Medi-Cal, etc.)	21	17	6	5	49
Aging into Medicare Postacd - CDA HICAP	0	0	0	0	0
CDA HICAP	0	0	0	0	0
CHA	0	0	0	0	0
CMS/Medicare	1	5	3	2	11
Friend/Relative	1	1	0	0	2
InfoVan	0	0	0	0	0
Internet	0	0	0	0	0
Mailings	0	0	0	0	0
Media	0	1	0	0	1
Other	3	3	3	2	11
Presentations	0	0	1	1	2
Previous Contacts	0	0	1	0	1
State Website	0	0	0	0	0
Missing/Not Collected	4	6	0	1	11
<b>Mode of Client Contact</b>					
Quick Call Contacts	33	26	6	6	71
Contacts by Telephone	28	32	13	9	82
Contacts In Person at home	0	0	1	0	1
Contacts In Person at site	6	6	1	2	15
Contacts by E-Mail	8	3	0	0	11
Contacts by Mail/Fax	0	0	0	1	1
Total Number of Client Contacts:	75	67	21	18	181
<b>Contact Status Types</b>					
General info	0	0	0	2	2
Detailed Assistance	0	0	11	10	21
Problem Solving/Resolution	0	0	1	0	1
<b>Total Counseling Time Spent by Counselor Type</b>					
Program Manager	0.00	5.55	2.30	2.30	10.15
Volunteer	0.00	0.00	0.00	0.00	0.00
Paid	17.00	18.05	9.50	4.25	48.80
In-Kind	0.00	0.00	0.00	0.00	0.00
<b>SECTION 2 - Client Demographics</b>					
<b>Ethnicity</b>					
(Hispanic/Latino)	27	26	10	9	72
<b>Race</b>					
African American/Black	0	0	0	0	0

From: 07/01/2010 To: 06/30/2011

## Client Contacts & Demographics

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
American Indian/Alaskan Native	0	0	0	0	0
Caucasian/White	3	5	2	1	11
Native Hawaiian	0	0	0	0	0
Guamanian or Chamoro	0	0	0	0	0
Samoan	0	0	0	0	0
Asian Indian	0	0	0	0	0
Chinese	0	0	0	0	0
Filipino	0	0	0	0	0
Japanese	0	0	0	0	0
Hmong	0	0	0	0	0
Korean	0	0	0	0	0
Vietnamese	0	0	0	0	0
Other Pacific Islander	0	0	0	0	0
Other Asian	0	0	0	0	0
Two or More Race	0	0	0	0	0
Some Other race	12	4	0	0	16
Not Collected	15	24	12	10	61
<b>Gender</b>					
Female	20	18	6	4	48
Male	10	12	8	7	37
Not Collected	0	3	0	0	3
<b>Monthly Income</b>					
Less than 150% of FPL	25	15	4	6	50
Equal To/Greater than 150% of FPL	4	14	9	4	31
Not collected	1	4	1	1	7
<b>Client Asset Limits</b>					
Below LIS Asset limit	0	0	5	4	9
At or Above LIS Asset Limit	0	0	2	1	3
Not Collected	30	33	7	6	76

From: 07/01/2010 To: 06/30/2011

## Client Contacts & Demographics

	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	TOTAL
<b>Total Clients that Checked Yes as Being</b>					
Veteran	0	1	0	0	1
Limited English Proficient (LEP)	22	17	10	7	56
Dual Eligible	14	11	4	4	33
Medicare Status Due to Disability	3	8	2	0	13
Dual Eligible due to Mental Disability	0	0	0	0	0
Applying/Receiving Social Security/Medicare Disability	0	0	2	0	2
<b>Age</b>					
Under 60	2	7	1	0	10
60-64	4	3	1	2	10
65-74	12	12	4	2	30
75-84	10	6	8	3	27
85+	2	5	0	1	8
Not Collected	0	0	0	3	3
<b>Marital Status</b>					
Married	8	16	7	5	36
Never Married	5	5	2	1	13
Separated	2	0	0	0	2
Divorced	3	3	1	1	8
Widowed	7	4	2	1	14
Domestic Partner	0	0	0	0	0
Not Collected	5	5	2	3	15
<b>Estimated Financial Saving</b>					
Clients with Financial Savings	1	1	1	0	3
Estimated Dollars Saved	\$10,000.00	\$1,000.00	\$5,000.00	\$0.00	\$16,000.00

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Topics/Needs Discussed					
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	TOTAL
	Q1	Q2	Q3	Q4	
Medicare Parts A&B (Original Medicare)					
Enrollment/Eligibility/Screening	7	10	2	2	21
Benefit Comparisons/Explanation/Coverge Changes	3	7	2	1	13
Appeals/Grievances	0	0	0	0	0
Billings/Claims	3	1	1	0	5
Fraud/Abuse	1	0	1	0	2
Quality of Care	0	0	0	0	0
LTC/LTCI					
Enrollment/Eligibility Assistance	0	0	0	0	0
Billings/Claims	0	0	0	0	0
LTC Partnership	0	0	0	0	0
Appeal/Greivances	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0
Other LTC	0	0	0	0	0
Medigap/Supplement/SELECT					
Enrollment/Eligibility/Screening	0	6	1	2	9
Benefit Explanation	0	3	2	2	7
Appeals/Grievances	0	0	0	0	0
Billings/Claims	0	0	1	0	1
Fraud/Abuse	0	0	0	0	0
Disenrollment/Coverage Changes	0	0	0	0	0
Quality of Care	0	0	0	0	0
Plan Comparison	0	0	0	0	0
Marketing/Sales Complaints/Issues	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
Medicare Advantage (e.g., MSA, HMO, PPO, Specialty Plans)					
Eligibility/Screening	7	15	2	3	27
Benefit Explanation	5	11	2	3	21
Appeals/Grievances	0	0	0	0	0
Billings/Claims	0	0	0	1	1
Fraud/Abuse	0	0	0	0	0
Coverage Changes/Disenrollment	1	0	1	0	2
Plan Non Renewal	1	0	0	0	1
Plan Comparison	0	0	0	0	0
Enrollment/Enrollment Asistance	0	0	0	0	0
Quality of Care	0	0	0	0	0
Marketing/Sales Complaints or Issues	0	0	0	0	0
Medi-Cal					
Medi-Cal Screening (SSI, Nursing Home)	2	1	2	0	5
Medi-Cal Application Assistance	0	0	0	0	0



From: 07/01/2010 To: 06/30/2011

	Topics/Needs Discussed				TOTAL
	JUL-SEP Q1	OCT-DEC Q2	JAN-MAR Q3	APR-JUN Q4	
MSP Screening (QMB, SLMB, Q-1)	6	2	2	3	13
MSP Application Assistance	0	0	0	3	3
Medi-Cal/QMB Claims	0	0	0	0	0
Fraud/Abuse	1	0	0	0	1
Other	14	6	2	1	23
<b>Other</b>					
Employer/Federal Health Benefits (FEHB)	1	3	0	2	6
Military Benefits	0	1	0	1	2
COBRA	0	0	0	1	1
Mental Health Topics	0	0	0	0	0
Fraud/Abuse	0	0	0	0	0
Other Health Insurance	0	0	0	0	0
Other	0	0	0	0	0
<b>Part D - Medicare Prescription Drug Coverage</b>					
Benefit Explanation	0	0	6	4	10
Eligibility/Screening	15	28	8	5	56
Plan Comparison	14	26	6	1	47
Enrollment/Anrollment Assistance	12	19	4	0	35
Billings/Claims	0	1	4	0	5
Coverage Changes	0	0	2	0	2
Re-enrollment	1	0	0	0	1
Disenrollment	0	0	0	0	0
TROOP	0	0	0	0	0
Other	18	14	2	0	34
<b>LIS / Extra Help</b>					
Eligibility / Screening	19	18	5	4	46
Benefit Explanation	0	0	4	4	8
Application Assistance	6	2	3	2	13
Claims/Billings	0	0	1	0	1
Appeals / Grievances	0	0	0	0	0
<b>Other Prescription Drug CoveragePlans</b>					
Union/employer	0	0	0	0	0
PPARx	0	0	0	0	0
Military Drug Benefit	0	0	0	0	0
Manufacturer Program	0	0	0	0	0
Other	0	0	0	0	0
<b>Part D Plan Problems</b>					
<b>(Non-Compliance Services Unmet)</b>					
Eligibility	0	0	0	0	0
Lag Time	0	0	0	0	0
Multiple Enrollment	0	0	0	0	0
Poor Training of Agents	0	0	0	0	0
Poor Training of CSR	0	0	0	0	0

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	Topics/Needs Discussed				TOTAL
	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	
Fraud/Abuse	0	0	0	0	0
Marketing Fraud/Abuse	0	0	0	0	0
Agent fraud/abuse	0	0	0	0	0
Formulary problems/changes	0	0	0	1	1
Dosage problem	0	0	0	0	0
Data problems	0	0	0	0	0
Delay in medications	0	1	0	2	3
Incorrect Co-Pay/Can't Afford Co-Pay	0	0	0	0	0
Client reached donut hole	0	0	0	0	0
SSA Premium withheld	0	0	1	0	1
Appeals/Grievances	0	0	0	1	1
Quality of Care	0	0	0	0	0
Plan Non Renewal	0	0	0	0	0
<b>HICAP Legal Services</b>					
Referrals to HICAP Legal	0	0	0	0	0
Legal Clients Served	0	0	0	0	0
Cases Opened	0	0	0	0	0
Cases Closed	0	0	0	0	0
Favorable Closed Case Results	0	0	0	0	0
Client Representation Hours	0	0	0	0	0
Consultation to Program Hours	0	0	0	0	0
HICAP Legal Clients that Saved	0	0	0	0	0
Estimated Financial Savings	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00

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### Complaints Filed

	JUL-SEP	OCT-DEC	JAN-MAR	APR-JUN	
	Q1	Q2	Q3	Q4	TOTAL
<b>Medicare Part D Complaints Filed</b>					
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
Part D Plan:	0	0	0	0	0
SMP:	0	0	0	0	0
Urgent Fax:	0	0	0	0	0
800 Medicare:	0	0	0	0	0
Other:	1	0	0	0	1
<b>TOTAL MEDICARE PART D COMPLAINTS</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>1</b>
<b>All Other Complaints</b>					
APS :	0	0	0	0	0
CDI:	0	0	0	0	0
CMS:	0	0	0	0	0
QIO:	0	0	0	0	0
SMP:	0	0	0	0	0
Other:	0	0	0	0	0
<b>TOTAL ALL OTHER COMPLAINTS</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
<b>800 Medicare Line Issues</b>					
Total number of Calls with Issues	0	0	0	0	0
Total duration of calls	0.00	0.00	0.00	0.00	0.00